



E-Pubs

User Manual

Washington State Digital Archives

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1.0 Definitions

1.1 List of Special Terms and Definitions

WSDA	Washington State Digital Archives
Record	A collection of information that contains fields.
Field	A space allocated for a particular item of information also called a cell. Most fields have certain types of attributes associated with them. This can include numeric or text. Every field has a name called the field name.
Metadata	Structured data about data
Contribute	A contributor will uploading a publication, receive confirmation, view the history of what was uploaded and approved for extraction and ingestion.
Approve	An approver will approve or deny uploaded publications and grant access to users in being able to upload publications.
Serial	A serial is a collection of publications.
Reports	A report shows publications that have been uploaded, approved, not approved, deleted and extracted.
Administration	An administrator can manage the user accounts by changing passwords, locking accounts, changing user settings, changing roles, changing names and agencies that the users belong to.

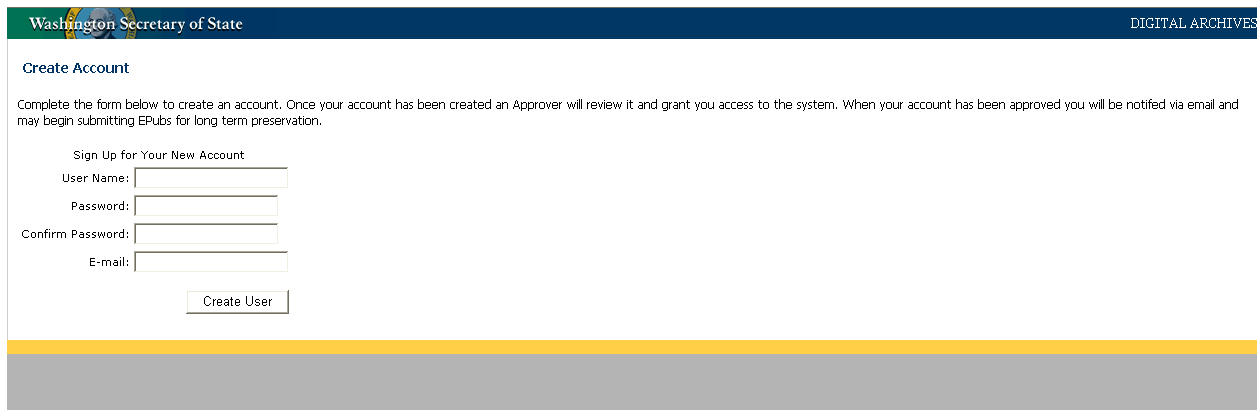
2.0 E-Pubs Instructions

2.1 Purpose

The E-Publication portal allows users from all state agencies to log in and submit electronic publications. The purpose of the portal is to archive, preserve, and make accessible valuable publications of the state of Washington.

3.0 Create Account

An account must be set up to access E-Pubs.



Washington Secretary of State DIGITAL ARCHIVES

Create Account

Complete the form below to create an account. Once your account has been created an Approver will review it and grant you access to the system. When your account has been approved you will be notified via email and may begin submitting EPubs for long term preservation.

Sign Up for Your New Account

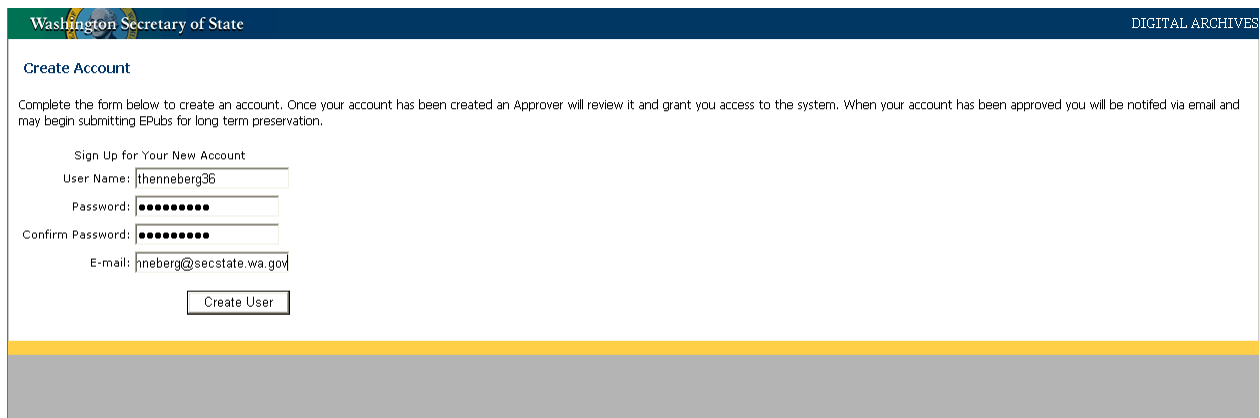
User Name:

Password:

Confirm Password:

E-mail:

To create an account the new account form must be filled out as shown below with a **User name**, **Password** and **E-mail** then click the *Create User* button.



Washington Secretary of State DIGITAL ARCHIVES

Create Account

Complete the form below to create an account. Once your account has been created an Approver will review it and grant you access to the system. When your account has been approved you will be notified via email and may begin submitting EPubs for long term preservation.

Sign Up for Your New Account

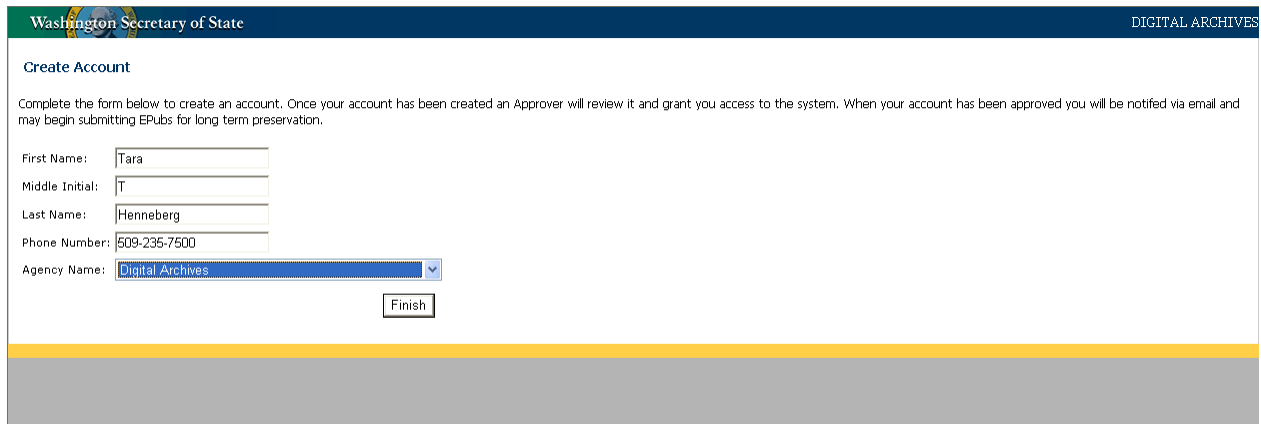
User Name:

Password:

Confirm Password:

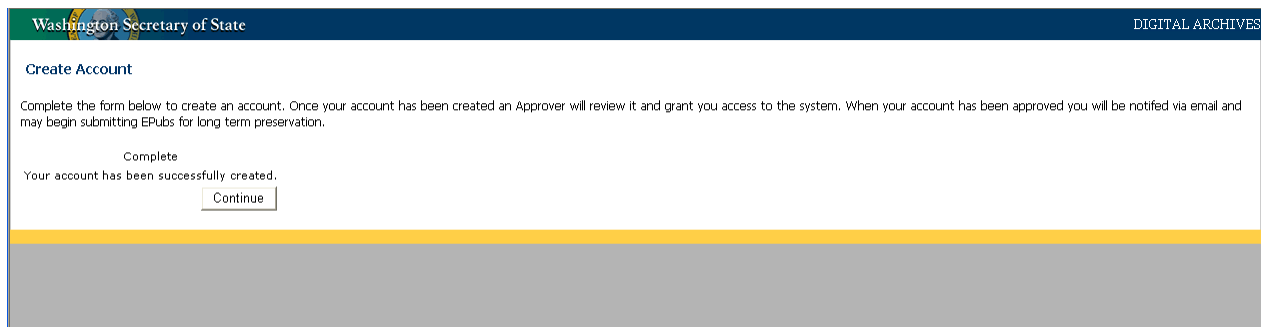
E-mail:

After the user account has been created a **First**, **Middle** and **Last** name will need to be entered along with a **Phone Number** and an **Agency Name**. A Agency Name must be selected in the drop down list then click *Finish*.



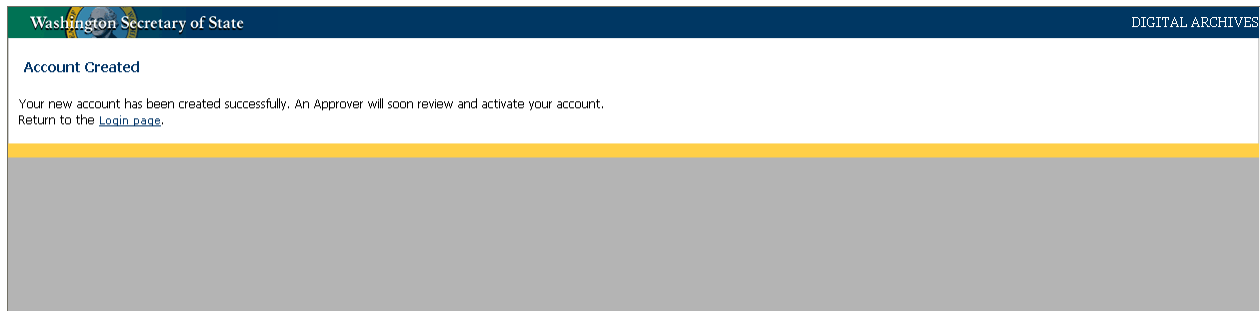
The screenshot shows a web form titled "Create Account" within the "Washington Secretary of State" header and "DIGITAL ARCHIVES" sub-header. The form includes a paragraph of instructions: "Complete the form below to create an account. Once your account has been created an Approver will review it and grant you access to the system. When your account has been approved you will be notified via email and may begin submitting EPubs for long term preservation." Below this, there are five input fields: "First Name:" with the value "Tara", "Middle Initial:" with the value "T", "Last Name:" with the value "Henneberg", "Phone Number:" with the value "509-235-7500", and "Agency Name:" which is a dropdown menu currently showing "Digital Archives". A "Finish" button is located at the bottom right of the form area.

The new user account will show **Complete** after it has been successfully created. (see *below*).

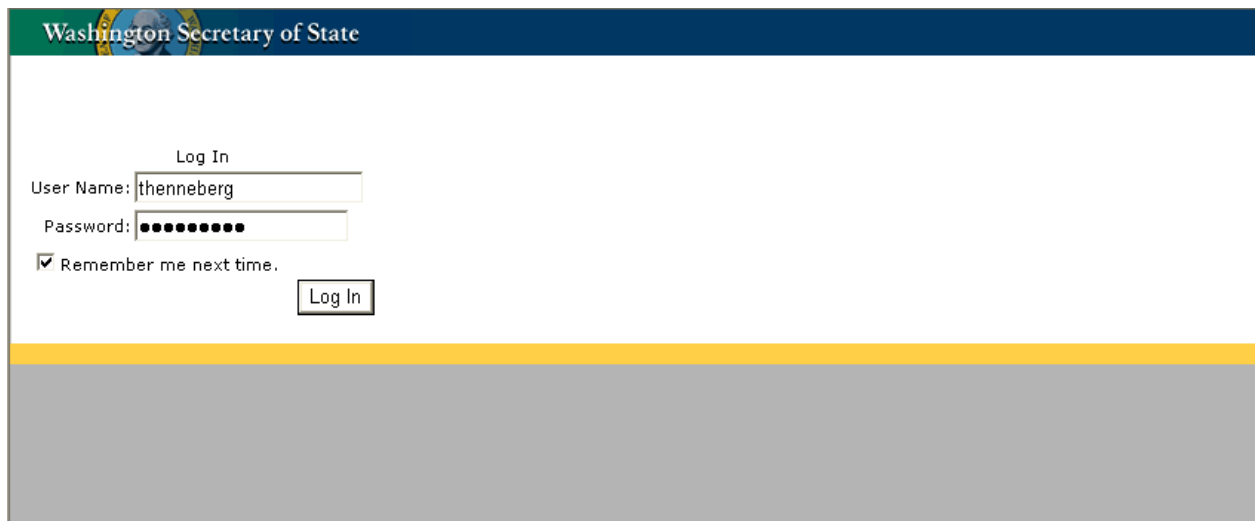


This screenshot shows the same "Create Account" form, but now it displays a success message. The text reads: "Complete Your account has been successfully created." Below this message is a "Continue" button. The rest of the form structure, including the header and instructions, remains the same as in the previous screenshot.

Once successfully created it will then navigate to the “Account Created” page notifying the user that an Approver will soon review the account and activate it.



Once user receives the approval by email they can login with their newly created user name and password. Check the *Remember me next time* box and click *Log In*.



4.0 Contribute

4.1 Submit Publication

To submit a publication, move the cursor over *Contribute* and select *Submit Publication*. An E-Publication may be uploaded by filling out the required metadata on the form as shown below. Then click *Submit E-Pub*.

The screenshot shows a web interface for the Washington Secretary of State. At the top is a dark blue header with the text "Washington Secretary of State" and a small logo. Below the header is a navigation bar with four tabs: "Contribute", "Approve", "Serials", and "Reports". The "Contribute" tab is active. Below the navigation bar, there is a link "Upload E-Publication" and a link "Logout". The main content area is a light blue box containing the following form fields and instructions:

Complete the form below to upload an E-Publication to the Washington State Library. If the creation year is not known use the creation year of the file reported by the operating system.
* Fields marked with an asterik are required.

* Publication Title:

* Publishing Agency:

Publication Author: First Name: Middle Name: Last Name:

* Creation Year (YYYY):

Volume Number:

Issue:

Notes:

* Publication:

Attached File (s):

4.2 View History

To view history of E-Pubs that are **awaiting approval**, that have been **approved**, and that have been **extracted for ingestion** move the cursor over *Contribute* and select *View History*.

Washington Secretary of State

Contribute Approve Serials Reports Administration

[View Submission History](#) [Logout](#)

Publications Awaiting Approval
None

Publications That Have Been Approved
None

Publications That Have Been Extracted For Ingestion
None

5.0 Approve

5.1 Approve Publications

To approve publications move the cursor over *Approve* and select *Approve Publications*. This will show the approver what has been uploaded and what will need to be **Approved**, **Deleted** or **Pended**.

Washington Secretary of State

Contribute Approve Serials Reports Administration

[Approve E-Pubs](#) [Logout](#)

Place a check box next to the publications that you wish to be approved.

Edit	Approve/Delete/Pend	Already In Catalog	Serial	Monograph	Notes	Agency Name	Publication Title	Author Name	Creation Year	Volume	Issue	Submitter
Edit	<input type="radio"/> Approve <input type="radio"/> Delete <input checked="" type="radio"/> Pend	<input type="radio"/> Yes <input checked="" type="radio"/> No	Is this e-pub part of a serial? <input type="radio"/> Yes <input checked="" type="radio"/> No Serial Name: <input type="text" value="None"/>	Is this publication a multi-part monograph? <input type="radio"/> Yes <input checked="" type="radio"/> No		Digital Archives	Washington State Highway Map 2001		2001			admin@digitalarc

5.2 Approve Users

To approve users move the cursor over *Approve* and select *Approve Users*. A list of new users they need to be activated will appear.

The screenshot shows the 'Approve Users' page. At the top is a navigation bar with 'Washington Secretary of State' on the left and 'DIGITAL ARCHIVES' on the right. Below this is a menu bar with 'Contribute', 'Approve', 'Serials', 'Reports', 'Administration', and 'Logout'. The 'Approve' menu is active, showing 'Approve' and 'Approve Users'. The 'Approve Users' link is selected, leading to the 'Activate New Users' page. The page has a sub-header 'Activate New Users' with a 'Logout' link. Below this is a table with columns: 'Activate', 'User Name', 'Email', 'User's Name', 'Phone Number', 'Partner Name', and 'Creation Date'. The table contains one row for user 'thenneberg34' with email 'tthenneberg@eagles.ewu.edu', name 'Tara T Henneberg', phone '509-235-7500', partner 'Digital Archives', and creation date '11/3/2008 9:30:24 AM'. Below the table is a checkbox for 'Activate' and a button 'Activate Users'. A disclaimer text is also present: 'By activating the selected user(s) above you agree that you have verified that the user(s) is who they claim to be.'

Activate	User Name	Email	User's Name	Phone Number	Partner Name	Creation Date
<input type="checkbox"/>	thenneberg34	tthenneberg@eagles.ewu.edu	Tara T Henneberg	509-235-7500	Digital Archives	11/3/2008 9:30:24 AM

By activating the selected user(s) above you agree that you have verified that the user(s) is who they claim to be.

Activate Users

6.0 Serial

6.1 Add Serial

To add a new serial move the cursor over *Serial* and select *Add Serial*, then select a name from the drop down list to add.

The screenshot shows the 'Add New Serial' page. At the top is a navigation bar with 'Washington Secretary of State' on the left and 'DIGITAL ARCHIVES' on the right. Below this is a menu bar with 'Contribute', 'Approve', 'Serials', 'Reports', and 'Administration'. The 'Serials' menu is active, showing 'Serials' and 'Add Serial'. The 'Add Serial' link is selected, leading to the 'Add New Serial' page. The page has a sub-header 'Add New Serial' with a 'Logout' link. Below this is a form with a 'Serial Name:' label and a text input field. Below the input field is a button 'Add New Serial'.

Add New Serial

Serial Name:

Add New Serial

6.2 Delete Serial

To delete a serial move the cursor over *Serial* and select *Delete Serial*, then select a name from the drop down list to delete.

Washington Secretary of State

Contribute Approve Serials Reports Administration

Delete Existing Serial [Logout](#)

Serial Name: None

Delete Serial

7.0 Reports

7.1 View Non Approved Publications

To view a non approved publication/ recently uploaded publications move the cursor over *Reports* and select *View Non Approved Publications* then a list of publications will appear that have not yet been approved by the approval authority.

Washington Secretary of State

DIGITAL ARCHIVES

Contribute Approve Serials Reports Administration Logout

Non-Approved / Recently Uploaded Publications [Logout](#)

Listed below are publications that have not been approved by the approval authority.

Agency Name	Publication Title	Author First Name	Author Middle Name	Author Last Name	Creation Year	Volume	Issue	Notes	Submitter's Email	Submitted Date	Submitted By	Approved By	Approved Date
Digital Archives	Washington State Highway Map 2001				2001				admin@digitalarchives.wa.gov	10/9/2008 11:27:00 AM	admin		

7.2 View Approved publications

To view approved publications move the cursor over *Reports* and select *View Approved Publications* then a list of publications will appear that have been approved by the approval authority.

Washington Secretary of State

DIGITAL ARCHIVES

Contribute

Approve

Serials

Reports

Administration

Logout

Approved Publications [Logout](#)

Listed below are publications that have been approved by the approval authority.

Agency Name	Publication Title	Author First Name	Author Middle Name	Author Last Name	Creation Year	Volume	Issue	Notes	Submitter's Email	Submitted Date	Submitted By	Approved By	Approved Date
Digital Archives	OSOS Mail Stops	Daniel	T	Waterbly	2008				admin@digitalarchives.wa.gov	10/8/2008 9:03:46 AM	admin	admin	10/8/2008 9:09:45 AM
Digital Archives	Washington State Highway Map 2001				2001				locdemo@secstate.wa.gov	10/9/2008 11:10:51 AM	locdemo	admin	10/9/2008 11:22:41 AM

7.3 View Deleted Publications

To view deleted publications move the cursor over *Reports* and select *View Deleted Publications* then a list of publications will appear that have been deleted by the approval authority.

Washington Secretary of State

DIGITAL ARCHIVES

Contribute

Approve

Serials

Reports

Administration

Logout

Deleted Publications

Logout

Approve Publications

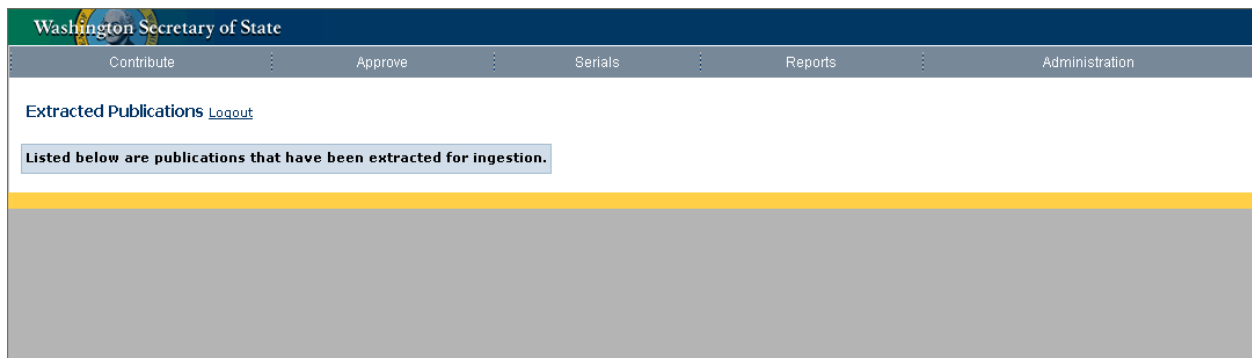
Approve Users

Listed below are publications that have been deleted by the approval authority.

Agency Name	Publication Title	Author First Name	Author Middle Name	Author Last Name	Creation Year	Volume	Issue	Notes	Submitter's Email	Submitted Date	Submitted By	Deleted By	Deleted Date
Digital Archives	Testing	Daniel	T	Waterbly	2008				admin@digitalarchives.wa.gov	9/24/2008 11:14:02 AM	admin	admin	10/8/2008 9:09:46 AM
Digital Archives	Washington State Highway Map 2000			Unknown	2000				admin@digitalarchives.wa.gov	10/9/2008 8:21:16 AM	admin	admin	10/9/2008 8:21:44 AM
Adams County Auditor	West Nile virus : do you know what's biting you?				2008				smoriarty@secstate.wa.gov	9/24/2008 2:11:57 PM	shawnmor	admin	10/9/2008 11:22:41 AM

7.4 View Extracted Publications

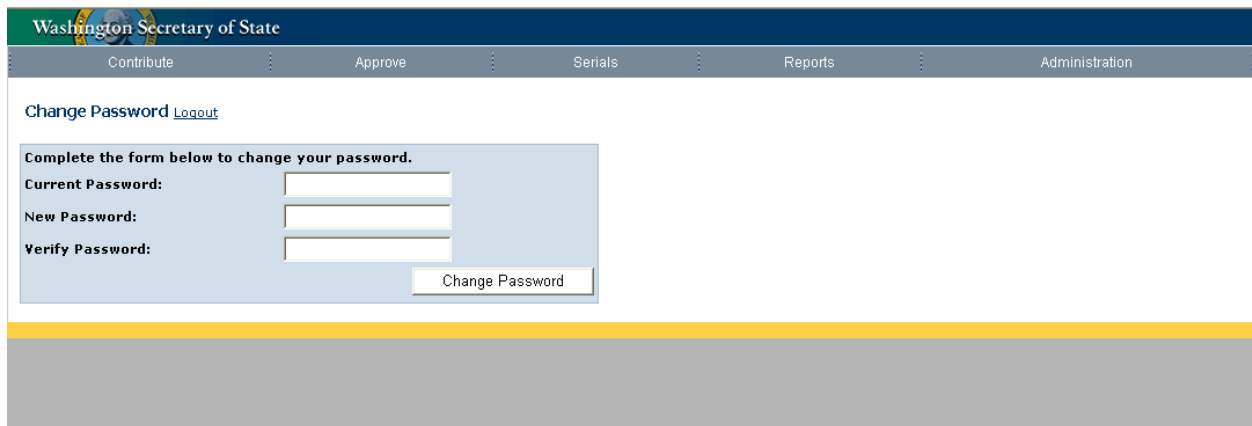
To view extracted publications move the cursor over *Reports* and select *View Extracted Publications* then a list of publications will appear that have been extracted for ingestion by the approval authority.



8.0 Administration

8.1 Change Password

A user may change their password by moving the cursor over *Administration* and selecting *Change Password* and completing the change password form as shown below.



8.2 Manage Profile

A user may manage their profile by moving the cursor over *Administration* and selecting *Manage Profile*. The user may then update their personal settings by completing the manage profile form as shown below.

The screenshot shows the 'Washington Secretary of State' web application. A navigation bar at the top contains links: 'Contribute', 'Approve', 'Serials', 'Reports', and 'Administration'. Below the navigation bar is a 'Logout' link. The main content area is titled 'Complete the form below to update your personal settings.' and contains a form with the following fields: 'First Name' (text input with 'Tara'), 'Middle Initial' (text input with 'T'), 'Last Name' (text input with 'Henneberg'), and 'Home Agency' (dropdown menu with 'Digital Archives' selected). An 'Update' button is located at the bottom right of the form.

8.3 Manage Users

To manage a user, move the cursor over *Administration* and select *Manage User*. To select a user fill in a user name in the user name field as shown below then click *Find*

The screenshot shows the 'Washington Secretary of State' web application. A navigation bar at the top contains links: 'Contribute', 'Approve', 'Serials', 'Reports', and 'Administration'. Below the navigation bar is a 'Logout' link. The main content area is titled 'Manage Users' and contains a form with a 'User Name' text input field and a 'Find' button. Below the form is a large grey rectangular area.

Prepared by Tara Henneberg

November 3, 2008